

Exploring **WEBGRANTS**

Cal Grant Processing through the Internet



An Overview of
the **NEW** Online
Cal Grant Roster

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

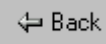
Custom Codes

Customizing the Roster

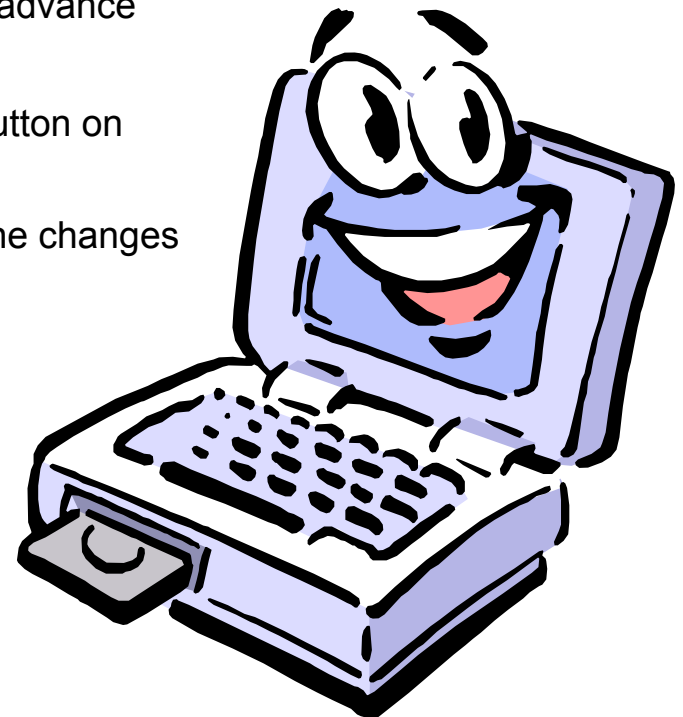
Additional Resources

Welcome to **WebGrants**, the California Student Aid Commission's internet based school user interface to the Cal Grant Delivery System. The Commission has been working hard to enhance this valuable payment tool to better meet the needs of participating schools.

This tutorial will focus on the biggest change to WebGrants – the new **Online Roster**. More flexible than ever, schools have literally hundreds of ways to customize their roster display. This tutorial is made up of 9 different lessons (listed on the left of the screen). You can click your left mouse button to advance through each slide.

To exit the tutorial at anytime, click the  Back button on your browser toolbar.

Enjoy the show and have fun, we hope you like the changes we have made! See you on the Internet!



Why Make Changes? Same and Different Old vs. New



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

Why did the Commission decide to make these changes?

- Requested by schools
- Issues we heard the most:
 - ❖ “Get the “not here” students off my roster!”
 - ❖ “How can I view multiple terms at the same time?”
 - ❖ “We want to have options for viewing and sorting our records”

When will these changes take effect?

- The new online roster will be ready mid to late April 2003 (date still tentative)

Why Make Changes? Same and Different Old vs. New



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

Many of the feature of the online roster will remain the same as they were on the Legacy WebGrants System.

What's the Same?

- Reporting payments
- Reporting need
- Adding students to the roster
- Viewing student payment history
- Adjustment reason codes and pay stat codes
- Error messages

What's Different?

- Custom sorting & filtering of roster data
- Ability to view multiple terms at the same time
- Ability to search the roster
- One roster screen instead of two
- Option to print your own roster

Why Make Changes? Same and Different Old vs. New

What are some of the **differences** you notice? What is the **same**?

New WebGrants - Online Roster

Reset Values Print Page SAVE

Total number of records: 49 Total number of pages: 10
1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code Submit
(Will display in Custom Code 5 field)

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 <input type="text"/> 2 <input type="text"/> 3 <input type="text"/> 4 <input type="text"/> 5 <input type="text"/>												
Fall Term												
Adj Reason Codes Delete Txn												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$776									
B	ACSS	\$1,551	\$776						GRT			
Spring Term												
Adj Reason Codes Delete Txn												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$775									
B	ACSS	\$1,551	\$775						GRT			

Old Legacy WebGrants – MSCA Screen

Close Window Reset values ADJ Rsn Save Back Next

RECORDS: 1 - 5 of 33

School Name
PALOMAR COLLEGE

Student Name
ALEX, SAM A

SSN
001260040

Grant ID
C99012797

Cycle ID
1

Record #
1

Prog Code	AWD Type	Annual AWD	Term AMT	ADJ AMT	ADJ Rsn	PAY Code	Need	Adj Need	Rec Type	Del Trans
Totals:		1551	776							
B	ACSS	1551	776						GRT	

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources

Why Make Changes? Same and Different Old vs. New



Reset values & Save button

same

are some of the **differences** you notice? What is the **same**?

New WebGrants

Roster

Total records count
different

[Reset Values](#)

[Print Page](#)

SAVE

Total number of records: 49 Total number of pages: 10

1 2 3 4 5 6 7 8 9 10 [Next](#)

Enter all records with custom code [Submit](#)

(Will display in Custom Code 5 field)

ALEX, SAM A

[View History](#)

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE

Custom Codes	1	2	3	4	5
10					

Fall Term	Adj Reason Codes	Delete Txn
-----------	------------------	------------

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type
Totals		\$1,551	\$776						
B	ACSS	\$1,551	\$776						GRT

Spring Term	Adj Reason Codes	Delete Txn
-------------	------------------	------------

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type
Totals		\$1,551	\$775						
B	ACSS	\$1,551	\$775						GRT

Payment and need fields
same

Multiple Terms
different

Old Legacy WebGrants – MSCA Screen

RECORDS: 1 - 5 of 33

[Close Window](#)

[Reset values](#)

[ADJ Rsn](#)

[Save](#)

[Back](#)

[Next](#)

School Name
PALOMAR COLLEGE

Student Name
ALEX, SAM A

SSN
001260040

Grant ID
C99012797

Cycle ID

Record #
1

Prog Code	AWD Type	Annual AWD	Term AMT	ADJ AMT	ADJ Rsn	PAY Code	Need	Adj Need	Rec Type	Del Trans
Totals:		1551	776							
B	ACSS	1551	776						GRT	

Open Browser

Web site

Logging In

Roster Main Menu



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

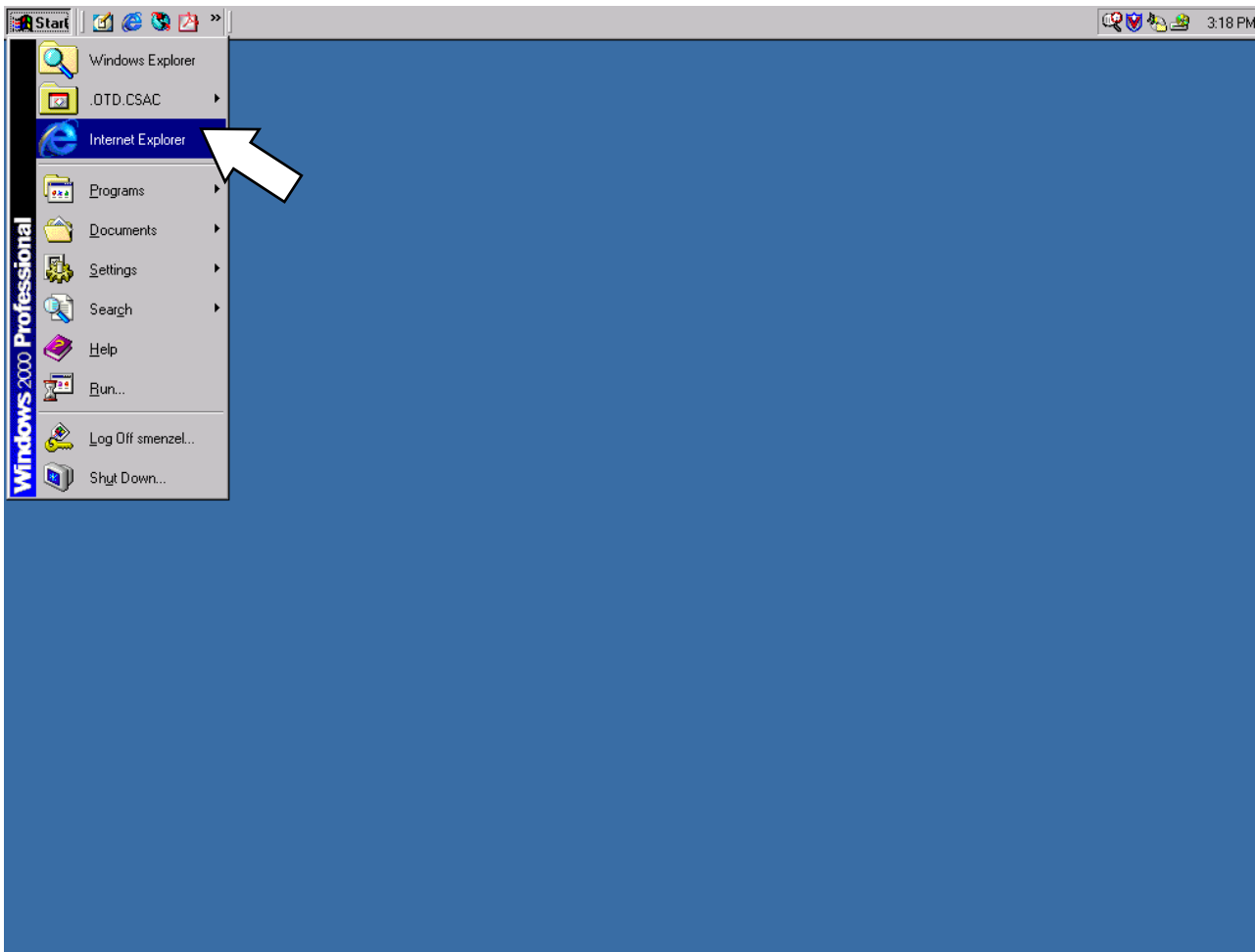
School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

WebGrants is a browser based program. Start by opening your browser application (Internet Explorer or Netscape).



♦ To use Web-Grants, users must have access to the Internet through an Internet Service Provider (ISP) or Intranet link.

♦ Users must also have a compatible web browser such as **Netscape** (version 6.2.3 or higher) or **Internet Explorer** (version 5.5 or higher).

The **NEW** Online Roster

Accessing the Roster

Open Browser

Web site

Logging In

Roster Main Menu



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

Type the WebGrants web address into the address field on your browser's toolbar.



♦ WebGrants is an Internet Secured Site and Information is only available to authorized users.

♦ The “https” in the address indicates that this is a secured site.

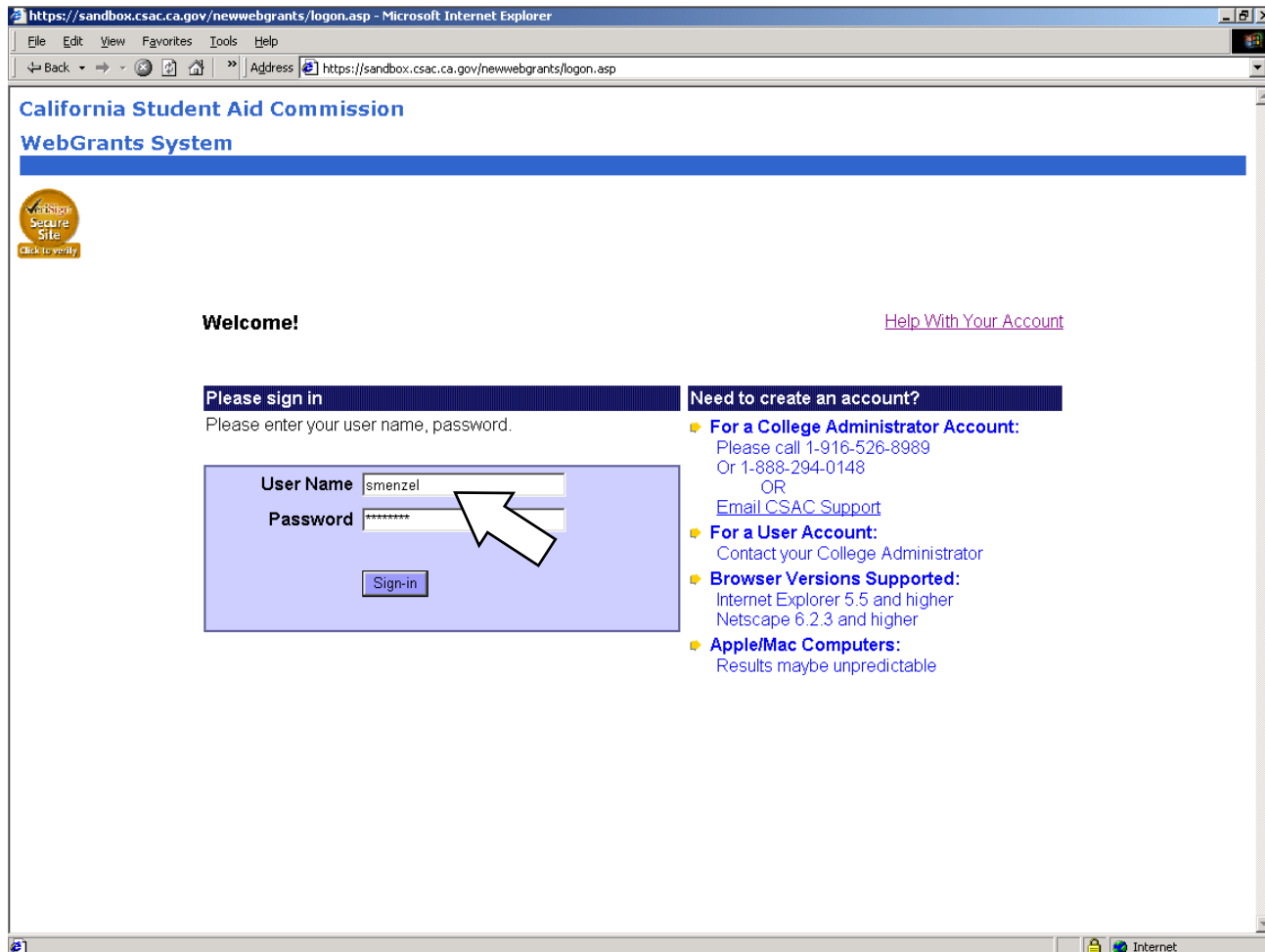
Open Browser

Web site

Logging In

Roster Main Menu

Log into WebGrants by typing your user name and password into the sign-in box (remember that user names and passwords are case-sensitive)




https://sandbox.csac.ca.gov/newwebgrants/logon.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Address https://sandbox.csac.ca.gov/newwebgrants/logon.asp

California Student Aid Commission
WebGrants System

 Click to verify

Welcome! [Help With Your Account](#)

Please sign in
Please enter your user name, password.

User Name smenzel
Password *****
[Sign-in](#)

Need to create an account?

- For a College Administrator Account:
Please call 1-916-526-8989
Or 1-888-294-0148
OR
[Email CSAC Support](#)
- For a User Account:
Contact your College Administrator
- Browser Versions Supported:
Internet Explorer 5.5 and higher
Netscape 6.2.3 and higher
- Apple/Mac Computers:
Results maybe unpredictable

- ◆ In order to access WebGrants for inquiry or update, your school must be a participant in the Cal Grant programs and have a current security agreement on file with the Commission.
- ◆ For more information about security agreements for WebGrants call 1-888-294-0148.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

Open Browser

Web site

Logging In

Roster Main Menu



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

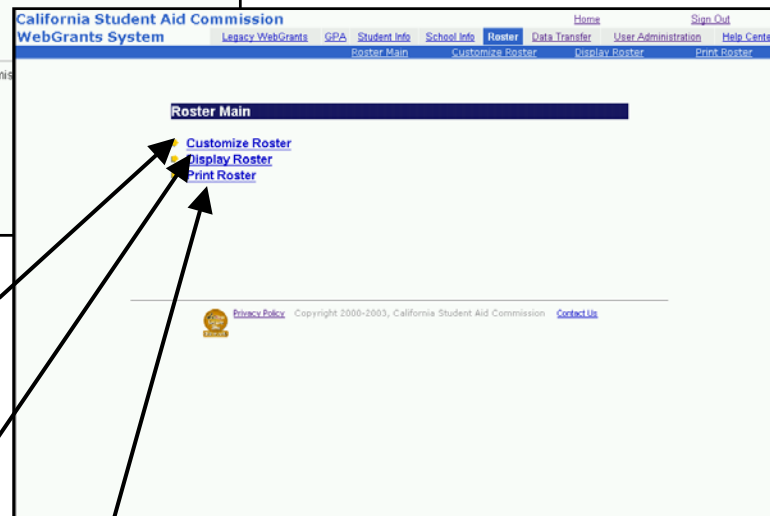
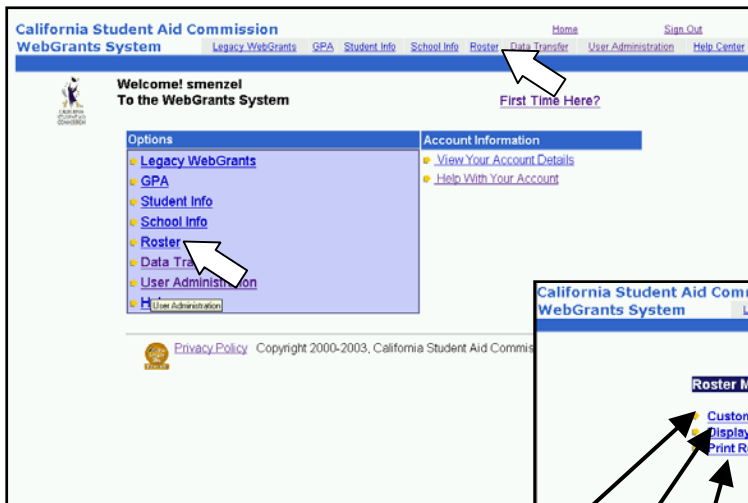
School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

From the WebGrants homepage, you can navigate to the Roster Main Page by clicking on either the [Roster](#) link in the options box, or on the navigation bar at the top of the page.



Customize Roster click here to modify the roster display by changing data elements, sort criteria and filter.

Display Roster click here to display students on the roster

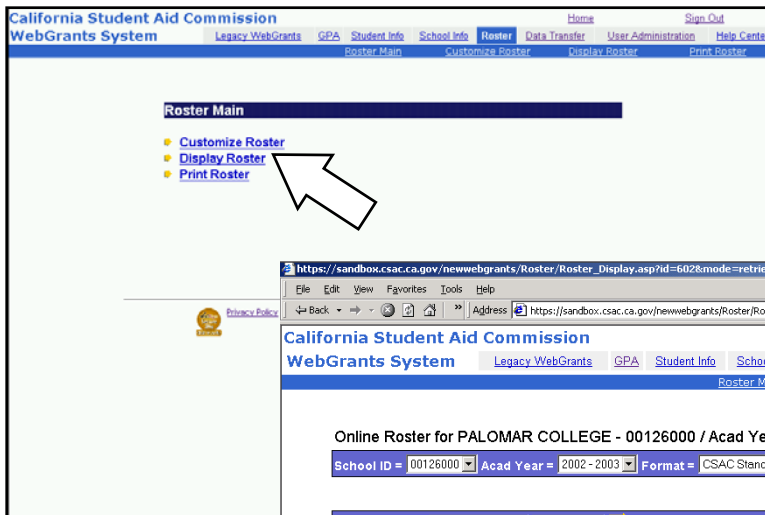
Print Roster click here to print the CSAC Standard Roster on standard 8.5"x11" paper on your default printer.

♦ To use WebGrants, users must have access to the Internet through an Internet Service Provider (ISP) or Intranet link.

♦ Users must also have a compatible web browser such as **Netscape** (version 4.0 or higher) or **Internet Explorer** (version 4.0 or higher).

Display Roster Search Field Search Results

Click on the Display Roster link on the Roster Main Page to display the Display Roster page.



https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=602&mode=retrieve&action=retrieve - Microsoft Internet Explorer

California Student Aid Commission WebGrants System

Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN = 601

Search Roster: Last Name [] 601

Total number of records: 49 Total number of pages: 10

Reset Values Print Page SAVE

Update all records with custom code (Will display in Custom Code 5 field)

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797	2	D	R	2	****	****	225.00%	100.00%		ELIGIBLE
Custom Codes 1 10 2 3 4 5												
Fall Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$776									
B	ACSS	\$1,551	\$776						GRT			
Spring Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$775									
B	ACSS	\$1,551	\$775						GRT			
BLAIRING, RITCH S View History												
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260024	11/22/51	C01044444	C1	2	I	R	3	****	****	200.00%	100.00%	ELIGIBLE

- ◆ Make sure that the correct school code is listed in the **School ID** field.
- ◆ Rosters are academic year specific. Select the appropriate academic year from the academic year drop down box.
- ◆ The CSAC Standard Roster format will always be available to schools. No student records are filtered out of the Standard Format.

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources

Display Roster Search Field Search Results

Click the Search Roster drop down list to select a search criteria. Type the criteria to match in the field next to the dropdown box and click the <GO> button.

- ◆ The Search function will cause the roster to jump to the first record that meets the criteria entered into the Search field. It is not a filter. For example, searching for the last name **Smith** will jump to the first **Smith** record, yet the user will still be able to view all other student records as well regardless of last name.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

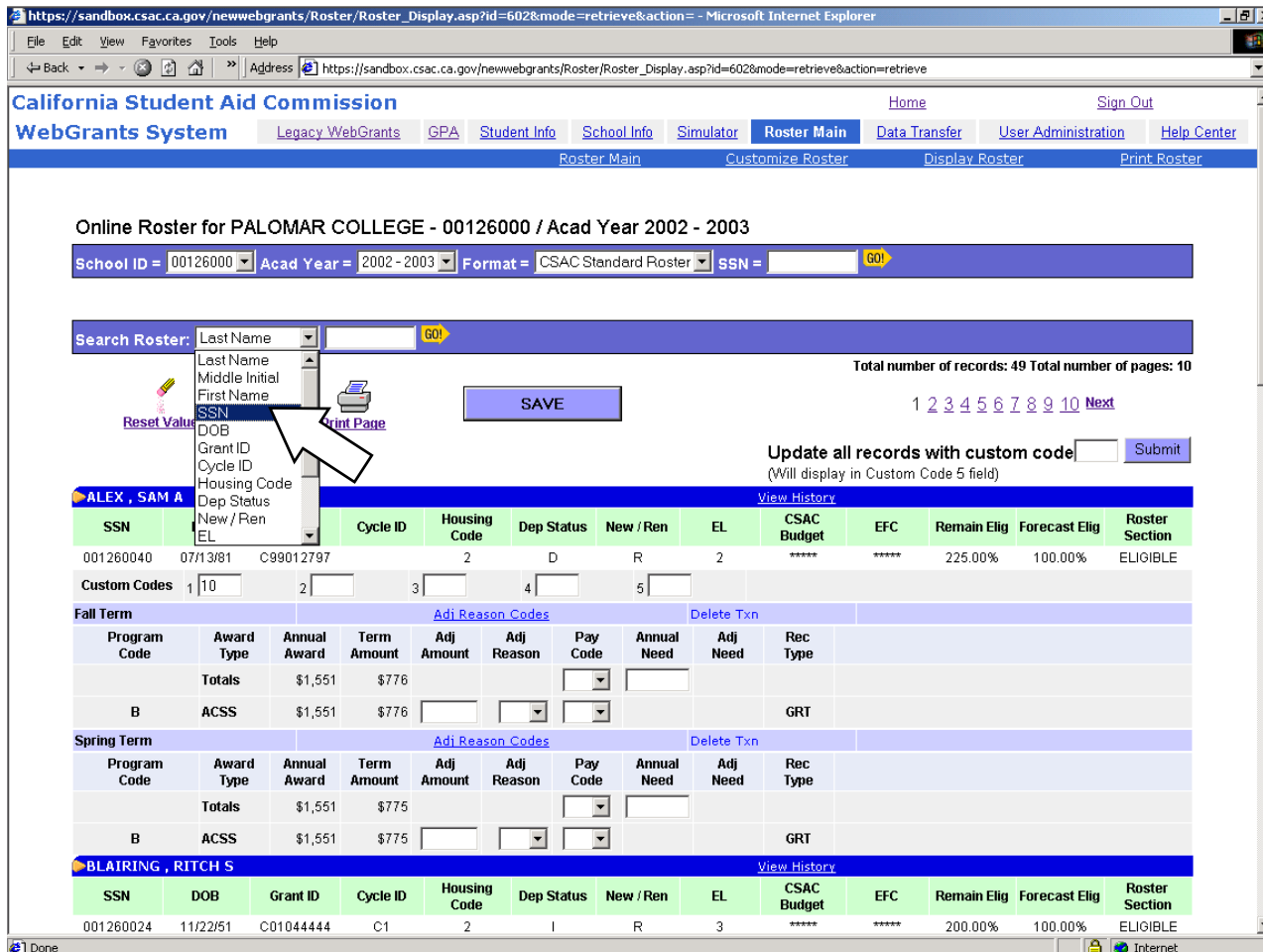
Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources



https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=6028&mode=retrieve&action= - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Address https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=6028&mode=retrieve&action=retrieve

California Student Aid Commission
WebGrants System

Legacy WebGrants GPA Student Info School Info Simulator Roster Main Data Transfer User Administration Help Center

Roster Main Customize Roster Display Roster Print Roster

Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN = GO!

Search Roster: Last Name Middle Initial First Name SSN DOB Grant ID Cycle ID Housing Code New / Ren EL

Reset Value Print Page SAVE

Total number of records: 49 Total number of pages: 10
1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code (Will display in Custom Code 5 field) Submit

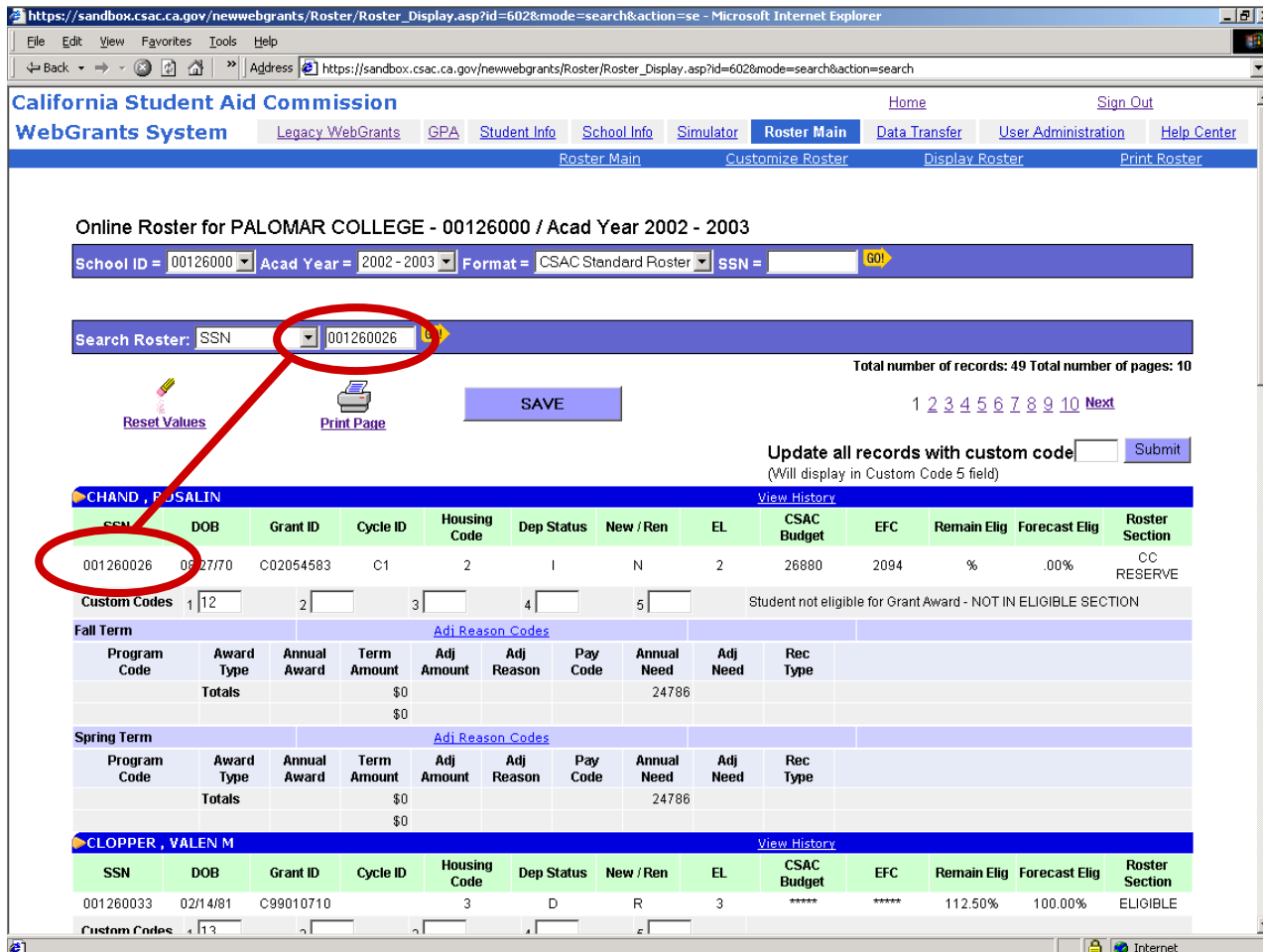
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797	2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE	
Custom Codes 1 10 2 3 4 5												
Fall Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$776									
B	ACSS	\$1,551	\$776						GRT			
Spring Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$775									
B	ACSS	\$1,551	\$775						GRT			
BLAIRING, RITCH S												
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260024	11/22/51	C01044444	C1	2	I	R	3	*****	*****	200.00%	100.00%	ELIGIBLE

Done Internet

Display Roster Search Field Search Results

The search result will display as the first record listed. To return to the original roster listing, clear out the search criteria box and click the <GO!> button again.

- ◆ The Search Roster function will only search the roster for the school ID currently displayed in the School ID field. It will not search records not already listed on the current school's roster.



https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=6028&mode=search&action=se - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Address https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=6028&mode=search&action=search

California Student Aid Commission
WebGrants System

Legacy WebGrants GPA Student Info School Info Simulator Roster Main Data Transfer User Administration Help Center

Roster Main Customize Roster Display Roster Print Roster

Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN =

Search Roster: SSN

Total number of records: 49 Total number of pages: 10

1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code
(Will display in Custom Code 5 field)

CHAND, ROSALIN [View History](#)

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260026	08/27/70	C02054583	C1	2	I	N	2	26880	2094	%	.00%	CC RESERVE

Custom Codes 1 12 2 3 4 5 Student not eligible for Grant Award - NOT IN ELIGIBLE SECTION

Fall Term [Adj Reason Codes](#)

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type
Totals			\$0				24786		

Spring Term [Adj Reason Codes](#)

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type
Totals			\$0				24786		

CLOPPER, VALEN M [View History](#)

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260033	02/14/81	C99010710		3	D	R	3	*****	*****	112.50%	100.00%	ELIGIBLE

Custom Codes 1 13 2 3 4 5

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

The **NEW** Online Roster

Reporting Payment Transactions

Payment History

Renewal Need

Payments

Deleting Transactions

Click the View History link on the student name bar to open a pop-up box linked to the student's payment history.

- ◆ Close the pop-up box by clicking the <X> button in the upper left-hand corner of the window.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

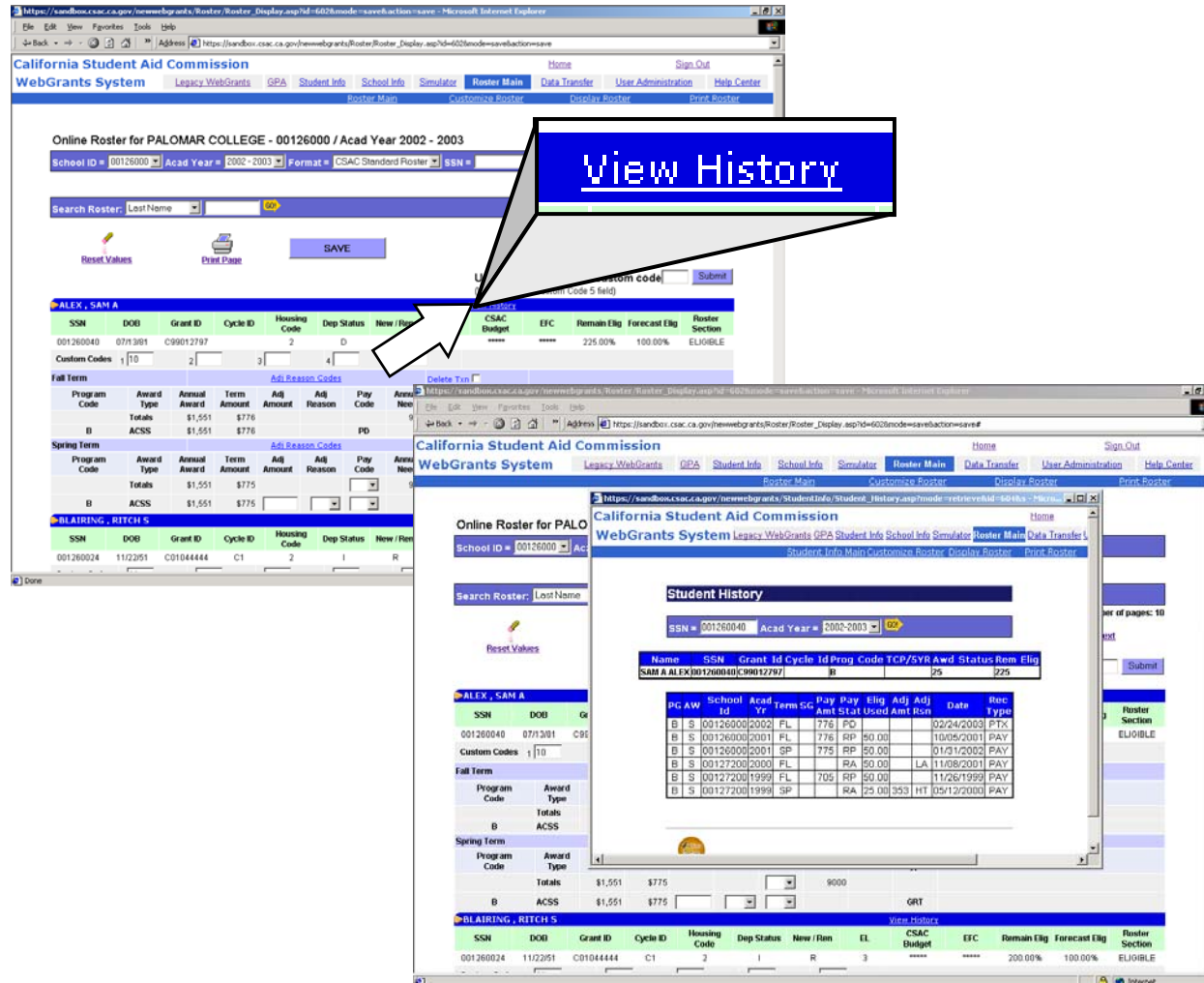
Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources



The screenshot displays the 'Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003'. It shows a list of students with columns for SSN, DOB, Grant ID, Cycle ID, Housing Code, Dep Status, New / Rem, EL, CSAC Budget, EFC, Remain Elg, Forecast Elg, and Roster Section. A student named 'ALEX, SAM A' is highlighted. A callout box with the text 'View History' points to a link in the student's name bar. Below the main roster, there is a 'Student History' pop-up window showing a detailed table of payment transactions for the selected student.

PG	AW	School	Acad	Term	SG	Pay	Pay	Elig	Adj	Adj	Date	Rec	Type
		ID	Yr			Am	Stat	Used	Am	Am			
B	S	00126000	2002	FL	1776	FP	00	00			02/24/2003		PTS
B	S	00126000	2001	FL	776	RP	00	00			10/05/2001		PAY
B	S	00126000	2001	SP	775	RP	50	00			01/31/2002		PAY
B	S	00127200	2000	FL	RA	50	00				11/08/2001		PAY
B	S	00127200	1999	FL	705	RP	50	00			11/26/1999		PAY
B	S	00127200	1999	SP	RA	25	00	353	HT		05/12/2000		PAY

The **NEW** Online Roster

Reporting Payment Transactions

Payment History

Renewal Need

Payments

Deleting Transactions



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

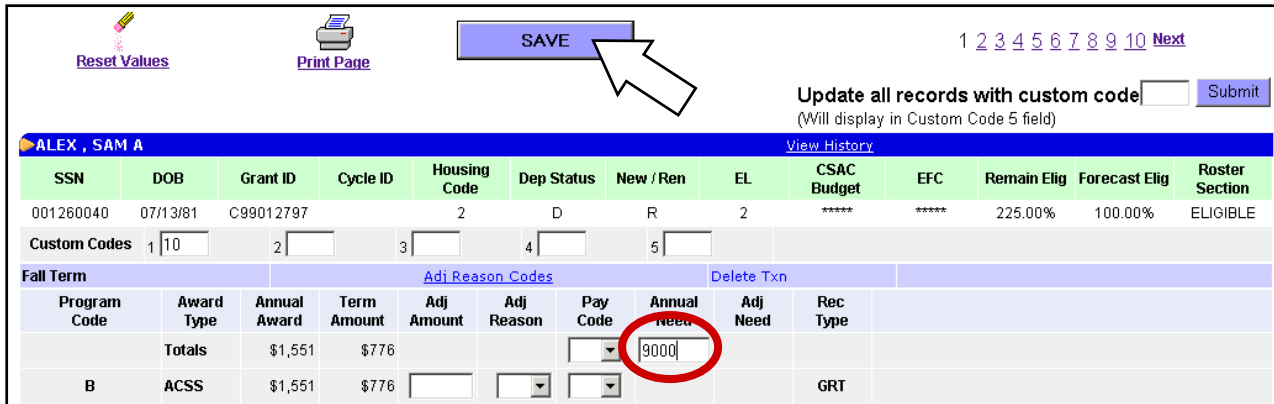
Customizing
the Roster

Additional
Resources

Report a renewal student's need by typing the need amount (rounded down to the nearest \$10) in the Annual Need field and clicking the <SAVE> button. The reported need will remain a pending transaction (PTX) until the Commission's weekly processing.

◆ Before reporting any payment transactions for a Renewal student (including posting a leave of absence), schools must determine if the student has enough need for the Cal Grant award.

◆ Renewal students must have a minimum of \$100 of renewal need to eligible for continued Cal Grant benefits.

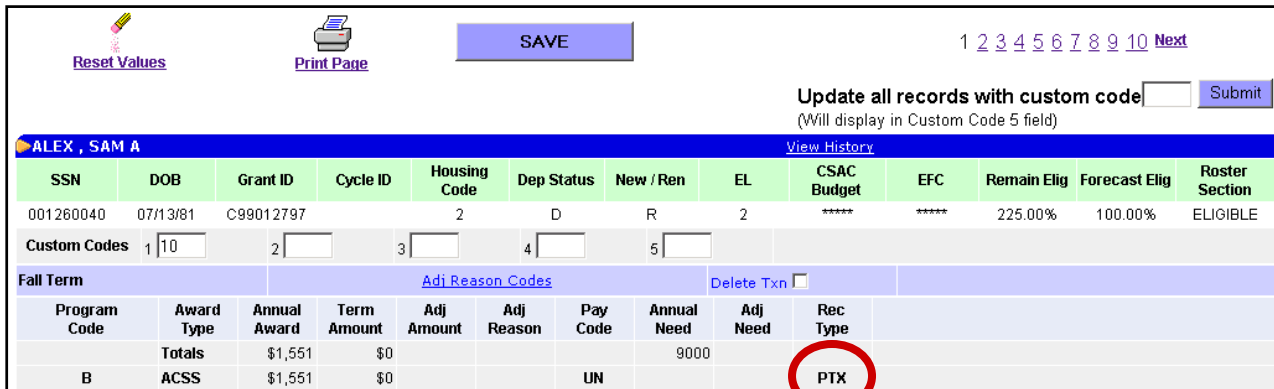


Reset Values Print Page SAVE 1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code Submit
(Will display in Custom Code 5 field)

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 10 2 3 4 5												
Fall Term Adj Reason Codes Delete Txn												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
	Totals	\$1,551	\$776				9000					
B	ACSS	\$1,551	\$776						GRT			



Reset Values Print Page SAVE 1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code Submit
(Will display in Custom Code 5 field)

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 10 2 3 4 5												
Fall Term Adj Reason Codes Delete Txn <input type="checkbox"/>												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
	Totals	\$1,551	\$0				9000					
B	ACSS	\$1,551	\$0			UN			PTX			

The **NEW** Online Roster

Reporting Payment Transactions

Payment History

Renewal Need

Payments

Deleting Transactions



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

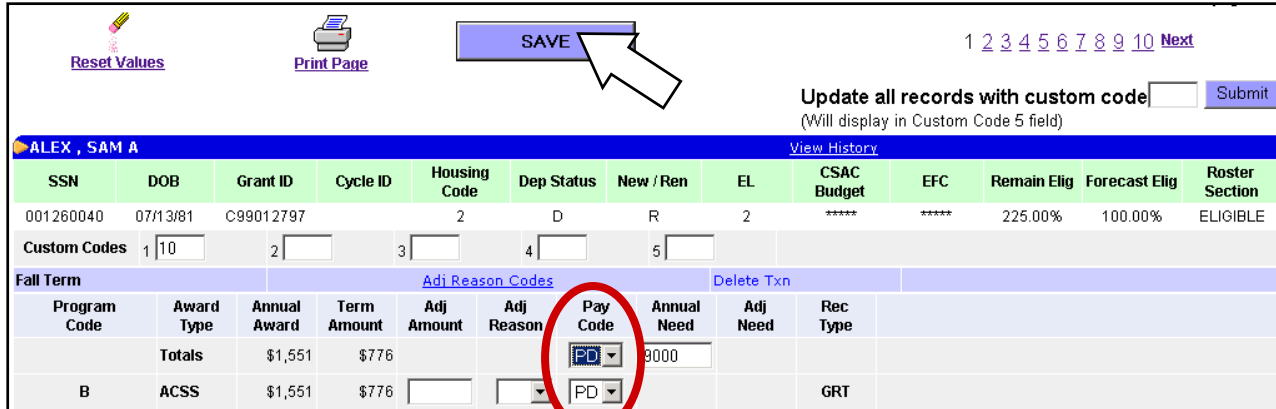
Custom
Codes

Customizing
the Roster

Additional
Resources

Report a student's Cal Grant payment by selecting "PD" from the Pay Code drop down field or by typing an adjusted amount in the Adj Amount field and selecting an adjustment reason code from the Adjustment Reason Code drop down box and clicking the <SAVE> button. The reported payment will remain a pending transaction (PTX) until the weekly processing.

- When reporting an adjusted payment, users can click on the [Adj Reason Code](#) link on this page to view a pop-up box with descriptions of each of the available adjustment reason codes.

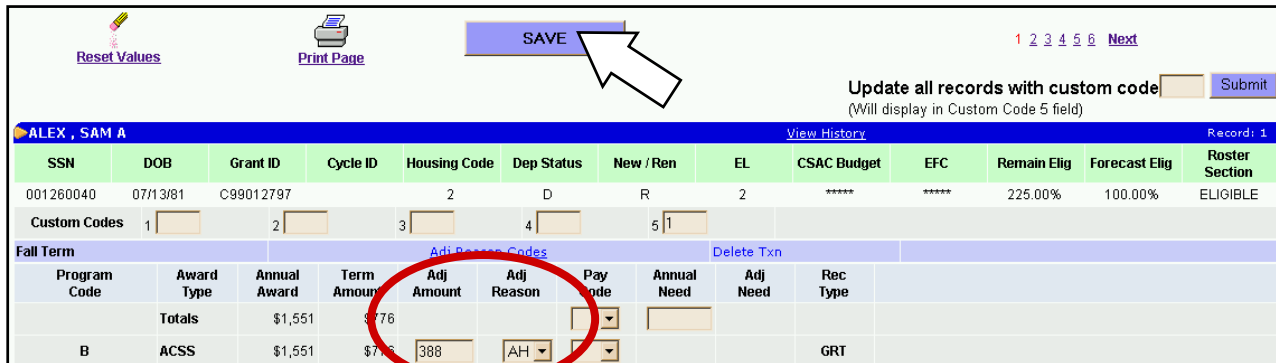


Reset Values Print Page SAVE 1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code Submit
(Will display in Custom Code 5 field)

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 <input type="text"/> 2 <input type="text"/> 3 <input type="text"/> 4 <input type="text"/> 5 <input type="text"/>												
Fall Term				Adj Reason Codes				Delete Txn				
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
	Totals	\$1,551	\$776			PD	9000					
B	ACSS	\$1,551	\$776			PD			GRT			



Reset Values Print Page SAVE 1 2 3 4 5 6 Next

Update all records with custom code Submit
(Will display in Custom Code 5 field)

ALEX, SAM A View History Records: 1

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 <input type="text"/> 2 <input type="text"/> 3 <input type="text"/> 4 <input type="text"/> 5 <input type="text"/>												
Fall Term				Adj Reason Codes				Delete Txn				
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
	Totals	\$1,551	\$776									
B	ACSS	\$1,551	\$776	388	AH				GRT			

The **NEW** Online Roster

Reporting Payment Transactions

Payment History

Renewal Need

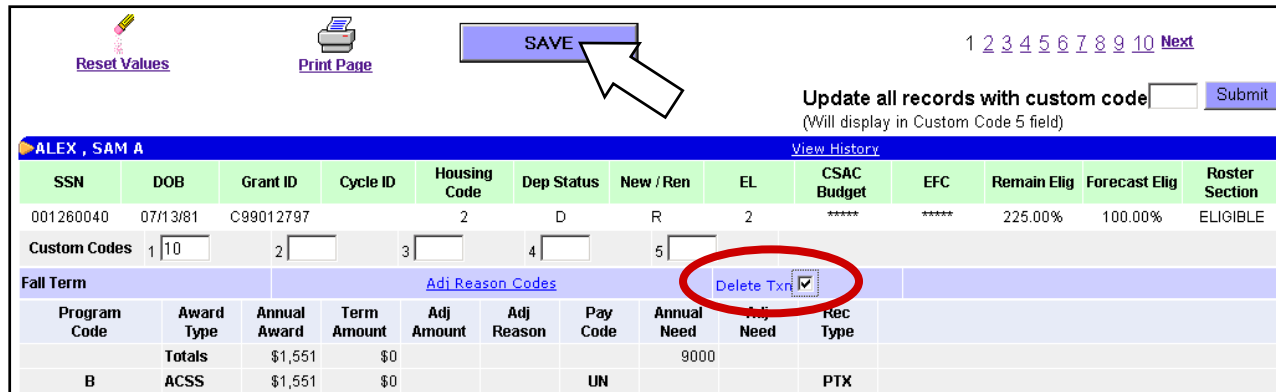
Payments

Deleting Transactions

To delete an already reported payment transactions before the Commission's weekly processing begins (usually Thursday night), check the Delete Txn box and click the <SAVE> button.

♦ To change a renewal student's reported annual need after the Commission's weekly processing has run, use the **Adj Need** field.

♦ To change a student's reported payment after the Commission's weekly processing has run, use the **Adj Amount** and **Adj Reason** fields.



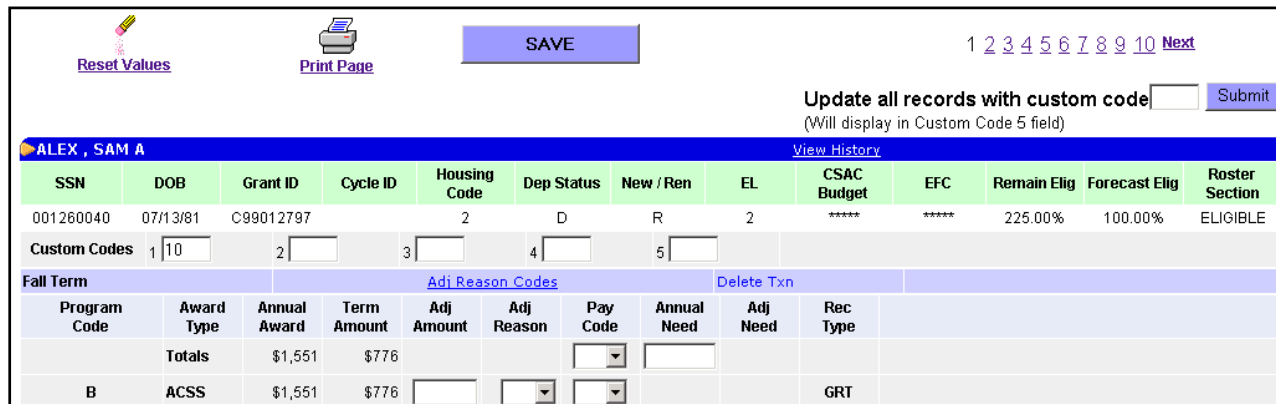
Reset Values Print Page SAVE

1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code Submit
(Will display in Custom Code 5 field)

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 <input type="text"/> 2 <input type="text"/> 3 <input type="text"/> 4 <input type="text"/> 5 <input type="text"/>												
Fall Term Adj Reason Codes Delete Txn <input checked="" type="checkbox"/>												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$0				9000					
B	ACSS	\$1,551	\$0			UN			PTX			



Reset Values Print Page SAVE

1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code Submit
(Will display in Custom Code 5 field)

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 <input type="text"/> 2 <input type="text"/> 3 <input type="text"/> 4 <input type="text"/> 5 <input type="text"/>												
Fall Term Adj Reason Codes Delete Txn <input checked="" type="checkbox"/>												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$776									
B	ACSS	\$1,551	\$776						GRT			

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

Custom Codes

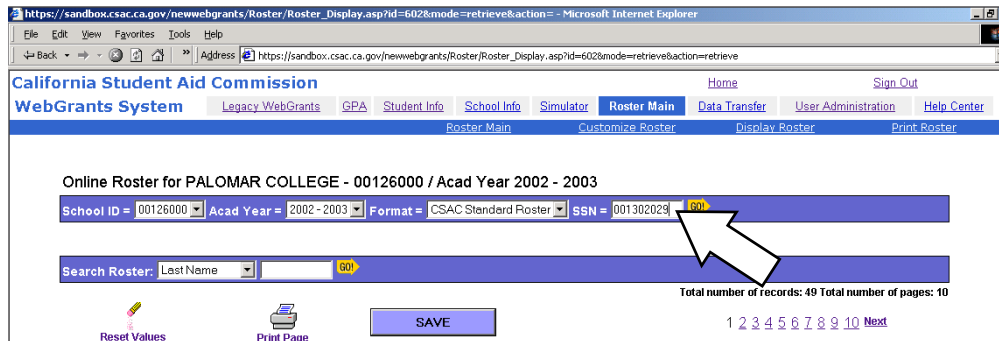
Customizing the Roster

Additional Resources

Viewing Students Not on Your Roster

School Change

To view a record for a student not on your roster, type the student's Social Security Number in the SSN field and click the <GO!> button.



Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

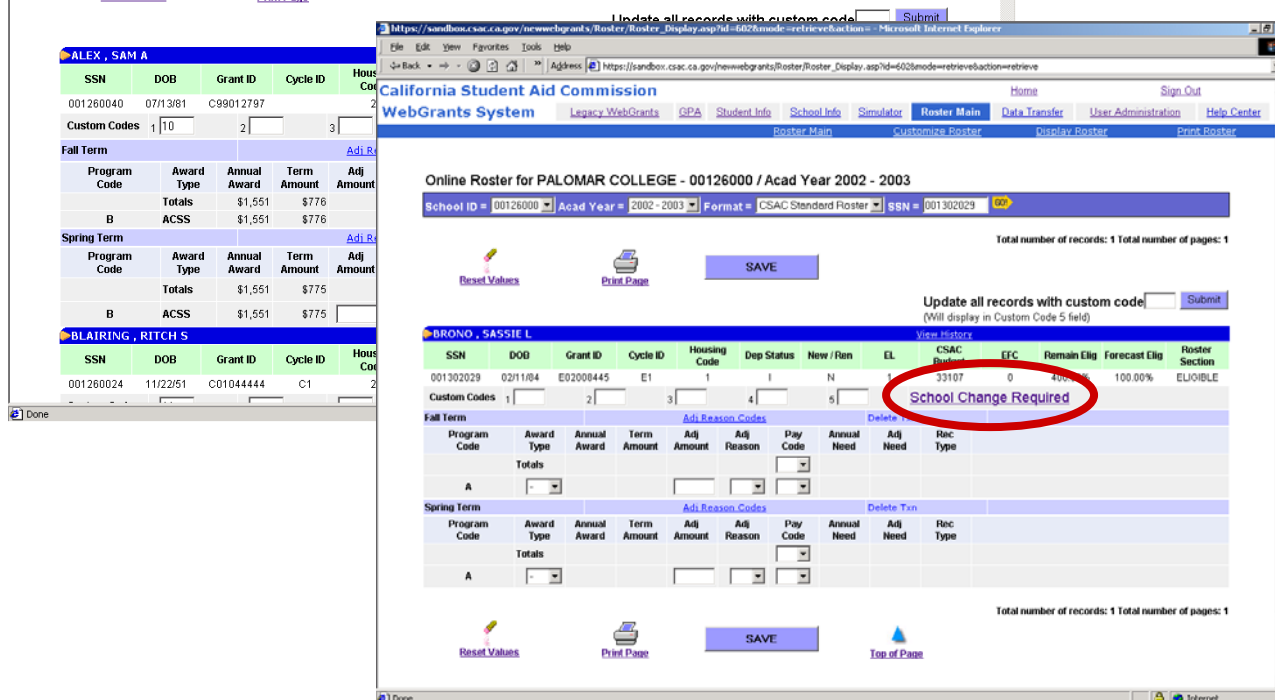
School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN = 001302029 **<GO!>**

Search Roster: Last Name [] **<GO!>**

Total number of records: 49 Total number of pages: 10

1 2 3 4 5 6 7 8 9 10 Next

Reset Values Print Page SAVE



Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN = 001302029 **<GO!>**

Total number of records: 1 Total number of pages: 1

Reset Values Print Page SAVE

Update all records with custom code (Will display in Custom Code 5 field) Submit

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Student	ETC	Remain Elig	Forecast Elig	Roster Section
001302029	02/11/84	E02006445	E1	1	I	N		33107	0	40.00%	100.00%	ELIGIBLE

Custom Codes 1 2 3 4 5

School Change Required

Done

◆ Students not on your roster will display the [School Change Required](#) link.

◆ Clicking on the [School Change Required](#) link will display a pop-up window that displays instructions on how to complete a school change.

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources



Viewing Students Not on Your Roster

School Change

Complete a school change by selecting "SC" from the Pay Code drop down field and clicking the <SAVE> button. The school change will remain a pending transaction (PTX) until the weekly processing.

- ◆ To request a school changes and report a payment at the same time, select "PD" from the Pay Stat drop down list and click the <SAVE> button.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

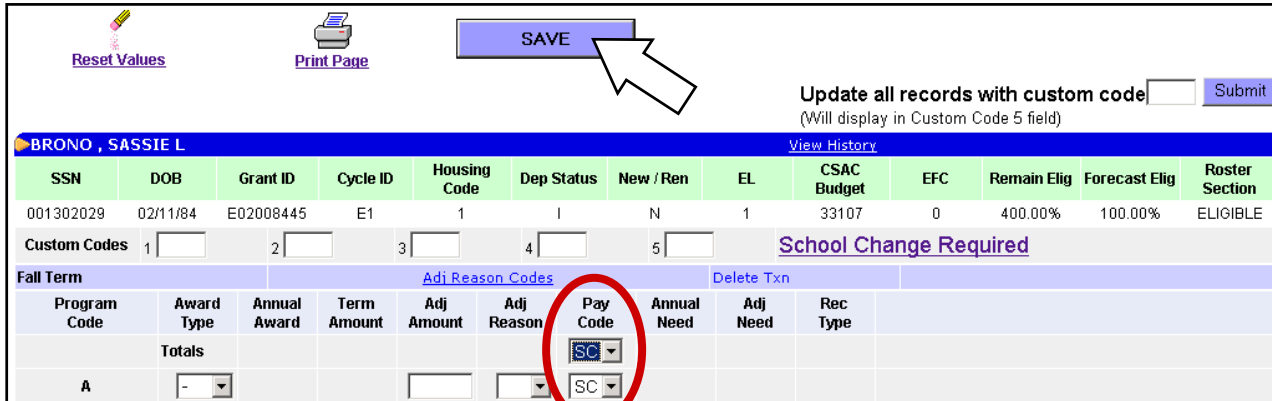
Reporting
Payment
Transactions

**School
Changes**

Custom
Codes

Customizing
the Roster

Additional
Resources



Reset Values Print Page SAVE

Update all records with custom code Submit
(Will display in Custom Code 5 field)

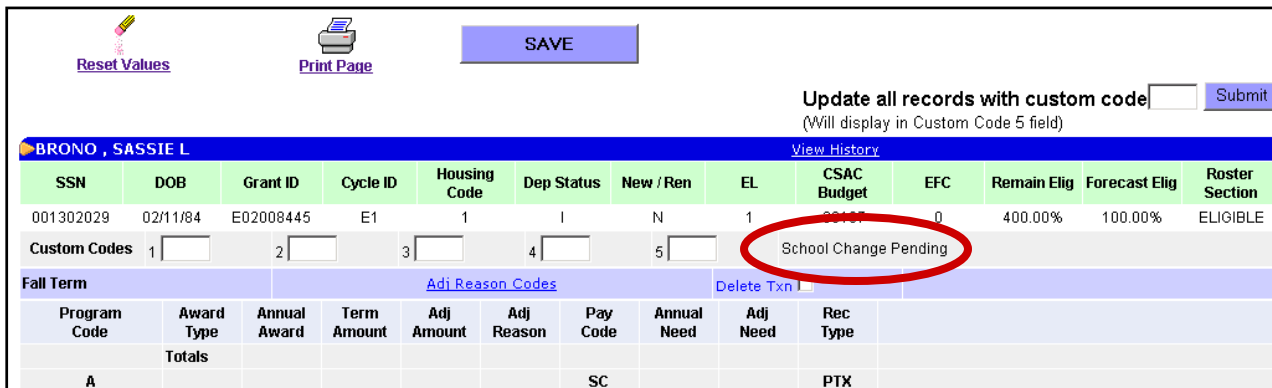
BRONO, SASSIE L View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001302029	02/11/84	E02008445	E1	1	I	N	1	33107	0	400.00%	100.00%	ELIGIBLE

Custom Codes 1 2 3 4 5 School Change Required

Fall Term Adj Reason Codes Delete Txn

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type
Totals						SC			
A	-					SC			



Reset Values Print Page SAVE

Update all records with custom code Submit
(Will display in Custom Code 5 field)

BRONO, SASSIE L View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001302029	02/11/84	E02008445	E1	1	I	N	1	33107	0	400.00%	100.00%	ELIGIBLE

Custom Codes 1 2 3 4 5 School Change Pending

Fall Term Adj Reason Codes Delete Txn

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type
Totals									
A						SC			PTX

Description

Uses

Custom Code 5

Examples

Custom codes can be used by schools to flag students for any reason. The Student Aid Commission performs no edits or validation on the entries in these fields, they are for school use only. Each of the 5 custom code field can accommodate 2 alpha or numeric characters.

- Custom code fields are specific to the school, meaning if one user at a particular school inputs a custom code into field 1, all other users at the same school will see the same code in field 1. Once a student transfers to another institution, any custom codes entered into these fields by the previous schools will be erased.

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

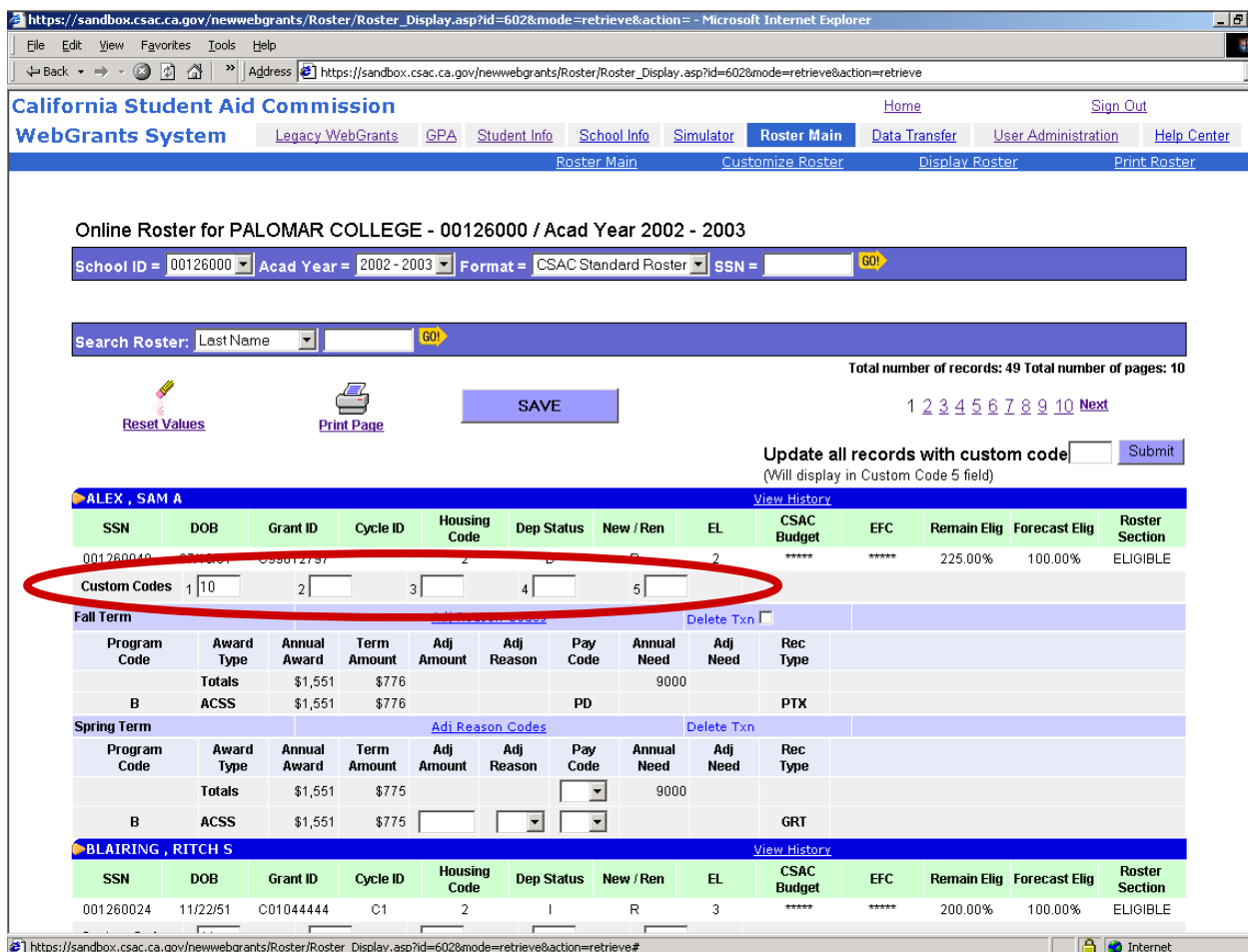
Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources



https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=602&mode=retrieve&action= - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=602&mode=retrieve&action=retrieve

California Student Aid Commission
WebGrants System

Legacy WebGrants GPA Student Info School Info Simulator Roster Main Data Transfer User Administration Help Center

Roster Main Customize Roster Display Roster Print Roster

Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN = GO

Search Roster: Last Name GO

Total number of records: 49 Total number of pages: 10

Reset Values Print Page SAVE

1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code (Will display in Custom Code 5 field) Submit

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260048	07/03/84	C0012137	2				2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 10 2 3 4 5												
Fall Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$776				9000					
B	ACSS	\$1,551	\$776			PD			PTX			
Spring Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$775				9000					
B	ACSS	\$1,551	\$775						GRT			
BLAIRING, RITCH S View History												
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260024	11/22/51	C01044444	C1	2	I	R	3	*****	*****	200.00%	100.00%	ELIGIBLE

https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=602&mode=retrieve&action=retrieve#

Description

Uses

Custom Code 5

Examples



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

Some of the ways schools can flag students using the custom codes include:

- Students not attending your school
- Students new to the roster
- Divided caseloads
- Verification of eligibility
- Reconciled versus un-reconciled payments
- SAP reviewed

Description

Uses

Custom Code 5

Examples

The **Update all records with custom code** field allows users to update, with the same code, custom code field 5 for every student on the roster.

- ◆ One way to use this option would be to identify students who are new to the roster. Start by updating all custom code fields 5 with an code such as "OR" for "on roster." Any student who is then added to the roster after the weekend processing will not have a code in that field and can be easily recognized.



Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources

https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=602&mode=retrieve&action= - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=602&mode=retrieve&action=retrieve

California Student Aid Commission

WebGrants System

Legacy WebGrants GPA Student Info School Info Simulator Roster Main Data Transfer User Administration Help Center

Roster Main Customize Roster Display Roster Print Roster

Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN = GO

Search Roster: Last Name GO

Total number of records: 49 Total number of pages: 10

Reset Values Print Page SAVE

1 2 3 4 5 6 7 8 9 10 Next

Update all records with custom code (Will display in Custom Code 5 field) Submit

ALEX, SAM A View History

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260040	07/13/81	C99012797		2	D	R	2	*****	*****	225.00%	100.00%	ELIGIBLE
Custom Codes 1 10 2 3 4 5												
Fall Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$776				9000					
B	ACSS	\$1,551	\$776			PD			PTX			
Spring Term												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$775				9000					
B	ACSS	\$1,551	\$775						GRT			
BLAIRING, RITCH S View History												
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Ren	EL	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
001260024	11/22/51	C01044444	C1	2	I	R	3	*****	*****	200.00%	100.00%	ELIGIBLE

https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Display.asp?id=602&mode=retrieve&action=retrieve#

Description

Uses

Custom Code 5

Examples

Here is an example of how one school might decide to use their custom codes:

SCHOOL'S PREDEFINED CUSTOM CODE FIELDS

Custom Code field #1 – **Caseworker**: Initials of assigned counselor

Custom Code field #4 – **Attendance Status**: "NA" (not attending)
Blank (attending)

Custom Code field #5 – **New to Roster**: "OR" (on roster)
Blank (new to roster)

♦ From this example you can see that for the first student listed:

- SM are the initials of the financial aid counselor assigned to this student;
- The student is attending this school (custom code field 4 is blank); and

- The student is not new to the roster this week (custom code field 5 has the code "OR").

TRUDOW , TAMMY M

View History

SSN	Grant ID	Dep Status	Remain Elig	Roster Section	DOB	Cycle ID	Housing Code	New / Ren	EL	CSAC Budget	EFC	Forecast El
001260013	C01054358	I	125.00%	ELIGIBLE	07/16/75	C1	2	R	1	*****	*****	100.00%
Custom Codes 1 SM 2 3 4 5 OR												
Fall Term Adj Reason Codes Delete Txn												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$576	\$288									
C	B/S	\$576	\$288						GRT			

VARRO , MAKIRA

View History

SSN	Grant ID	Dep Status	Remain Elig	Roster Section	DOB	Cycle ID	Housing Code	New / Ren	EL	CSAC Budget	EFC	Forecast El
001260027	E02073597	D	400.00%	ELIGIBLE	05/22/83	E1	3	N	1	7638	31	100.00%
Custom Codes 1 LD 2 3 4 5												
Fall Term Adj Reason Codes Delete Txn												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$1,551	\$776				7607					
B	ACSS	\$1,551	\$776						GRT			

VUUM , QUYEN T

View History

SSN	Grant ID	Dep Status	Remain Elig	Roster Section	DOB	Cycle ID	Housing Code	New / Ren	EL	CSAC Budget	EFC	Forecast El
001260055	E02011073	D	400.00%	ELIGIBLE	03/25/83	E1	3	N	1	7638	691	100.00%
Custom Codes 1 2 3 4 NA 5 OR												

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources

Custom Roster Page Creating a Custom Roster Displaying a Custom Roster



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

Depending on their needs, users may find it necessary to view rosters that exclude or include certain data elements as well as modify the filtering and sorting of records.

After customizing a roster view, users can enter and save their display criteria into **roster profiles** that are stored on this page. These profiles can be selected later for easier and quicker access to data. To create a customized roster, click on the [Add New Format](#) link on this page.

California Student Aid Commission
WebGrants System

[Home](#) [Sign Out](#)
[Legacy WebGrants](#) [GPA](#) [Student Info](#) [School Info](#) **Roster** [Data Transfer](#) [User Administration](#) [Help Center](#)
[Roster Main](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#)

Customize Roster

- The following is a list of your roster formats.
- You can add or delete up to 5 roster formats. The CSAC Standard Roster can not be changed or deleted.
- Existing roster formats can be copied, edited and renamed.
- Any roster format can be chosen as the "Preferred Format." The Preferred Format will display automatically when "Display Roster" is selected from the Roster Main menu.

Row #	Name	Preferred Format	Edit	Delete
1	CSAC Standard Roster	<input checked="" type="radio"/>		
2	My Accounts	<input type="radio"/>		<input type="checkbox"/>
3	New Students	<input type="radio"/>		<input type="checkbox"/>
4	Students on Leave	<input type="radio"/>		<input type="checkbox"/>

[Add New Format](#)


[Privacy Policy](#) Copyright 2000-2003, California Student Aid Commission [Contact Us](#)

- ◆ WebGrants users can create and save up to 5 customized roster profiles.
- ◆ The CSAC Standard Roster format will always be available to schools and cannot be modified.
- ◆ Customized roster formats can be deleted from this page by checking the box in the Delete column that corresponds with the roster to be deleted.

Custom Roster Page Creating a Custom Roster Displaying a Custom Roster



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

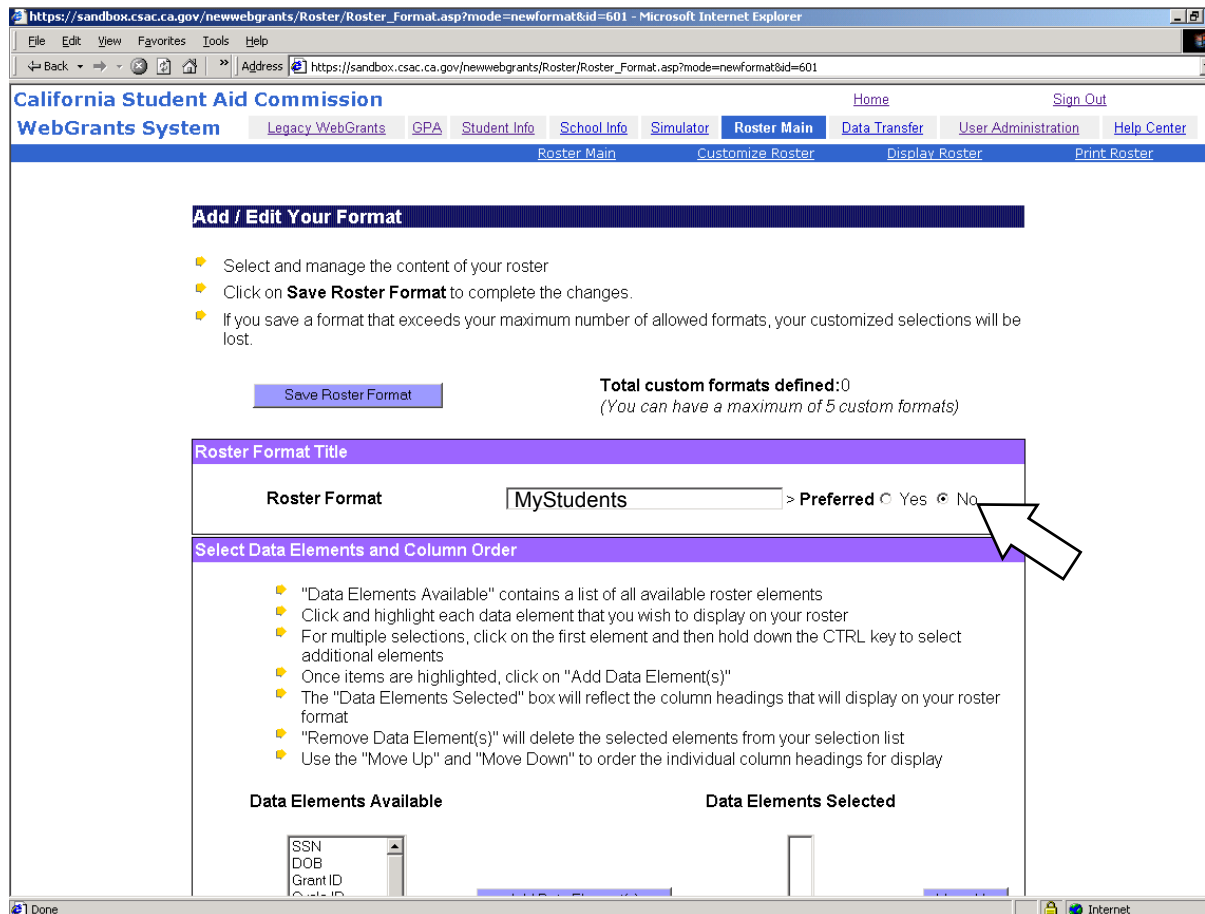
School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

1) Create and type a name for the customized roster you are creating. If you would like this roster to automatically be the first listed on the Display Roster Page, click the Yes radial button next to **Preferred**.



https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?mode=newformat&id=601 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?mode=newformat&id=601

California Student Aid Commission

WebGrants System

Legacy WebGrants GPA Student Info School Info Simulator Roster Main Data Transfer User Administration Help Center

Roster Main Customize Roster Display Roster Print Roster

Add / Edit Your Format

- Select and manage the content of your roster
- Click on **Save Roster Format** to complete the changes.
- If you save a format that exceeds your maximum number of allowed formats, your customized selections will be lost.

Save Roster Format

Total custom formats defined: 0
(You can have a maximum of 5 custom formats)

Roster Format Title

Roster Format MyStudents > Preferred ☐ Yes ☐ No

Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements
- Click and highlight each data element that you wish to display on your roster
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements
- Once items are highlighted, click on "Add Data Element(s)"
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format
- "Remove Data Element(s)" will delete the selected elements from your selection list
- Use the "Move Up" and "Move Down" to order the individual column headings for display

Data Elements Available

SSN
DOB
Grant ID
State ID

Data Elements Selected

◆ Do **NOT** use special characters such as apostrophes, hyphens or slashes in the Roster Format Title. Only letters and numbers should be used.

◆ Examples of special characters:
!@#\$%^&*():."

Custom Roster Page

Creating a Custom Roster

Displaying a Custom Roster

- Highlight the data elements in the left column and click the <Add Data Elements> button to move it too the Data Elements Selected column and to select it for viewing on this customized roster.

- You can select the order in which the data elements will appear on the Display Roster Page. Use the <Move Up> and <Move Down> buttons to alter the appearance order.

- Highlight and use the <Remove Data Elements> button to remove any data elements you no longer want to view on this customized roster.

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

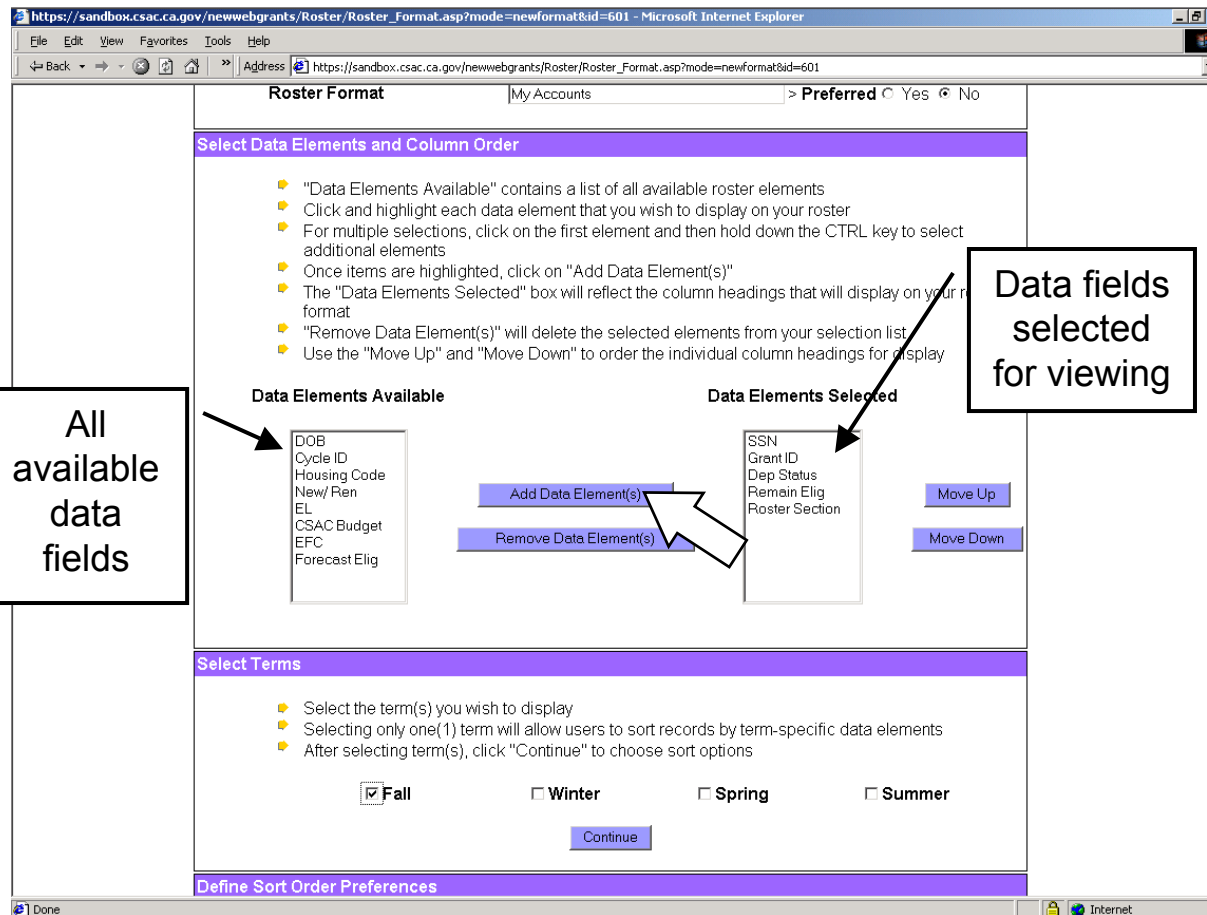
Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources



The screenshot shows the "Roster Format" page in a Microsoft Internet Explorer browser. The address bar displays the URL: https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?mode=newformat&id=601. The page has a title bar "Roster Format" and a "My Accounts" link. Below the title bar is a section titled "Select Data Elements and Column Order". This section contains instructions and two columns of data elements. The "Data Elements Available" column lists: DOB, Cycle ID, Housing Code, New/ Ren, EL, CSAC Budget, EFC, and Forecast Elig. The "Data Elements Selected" column lists: SSN, Grant ID, Dep Status, Remain Elig, and Roster Section. Between the columns are buttons for "Add Data Element(s)", "Remove Data Element(s)", "Move Up", and "Move Down". Below these columns is a section titled "Select Terms" with instructions and four radio buttons: ☒ Fall, ☐ Winter, ☐ Spring, and ☐ Summer. At the bottom of the "Select Terms" section is a "Continue" button. Below the "Select Terms" section is a section titled "Define Sort Order Preferences". Annotations with arrows point to the "Data Elements Available" column (labeled "All available data fields"), the "Add Data Element(s)" button, the "Data Elements Selected" column (labeled "Data fields selected for viewing"), and the "Remove Data Element(s)" button.

Custom Roster Page

Creating a Custom Roster

Displaying a Custom Roster

3) Select the terms you wish to display. Click the <Continue> button to populate the sort drop down lists with the data elements you selected.

- ◆ To sort the records in a customized roster by any term specific data elements such as Pay Code, Adjustment Amount, etc. only one term can be selected.
- ◆ If the <Continue> button is not selected, the roster format cannot be saved.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

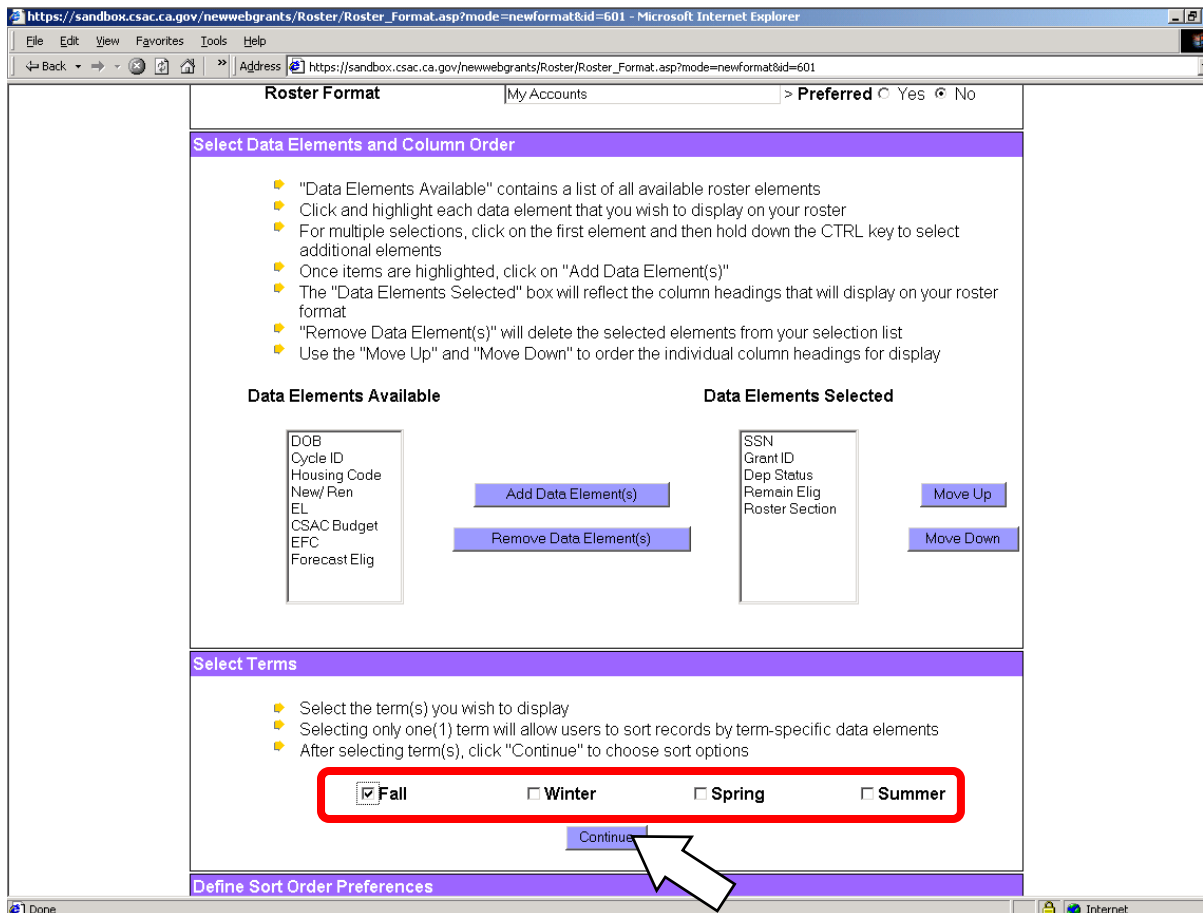
Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources



The screenshot shows a web browser window with the URL https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?mode=newformat&id=601. The page is titled "Roster Format" and has a "My Accounts" link. Below the title bar, there are two main sections: "Select Data Elements and Column Order" and "Select Terms".

Select Data Elements and Column Order: This section contains instructions for selecting data elements. It lists "Data Elements Available" (DOB, Cycle ID, Housing Code, New/ Ren, EL, CSAC Budget, EFC, Forecast Elig) and "Data Elements Selected" (SSN, Grant ID, Dep Status, Remain Elig, Roster Section). There are buttons for "Add Data Element(s)", "Remove Data Element(s)", "Move Up", and "Move Down".

Select Terms: This section contains instructions for selecting terms. It lists "Fall", "Winter", "Spring", and "Summer". The "Fall" checkbox is selected. Below the checkboxes is a "Continue" button, which is highlighted with a red box and a white arrow pointing to it.

Define Sort Order Preferences: This section is at the bottom of the page and is currently empty.

Custom Roster Page

Creating a Custom Roster

Displaying a Custom Roster

- 4) Users can select up to 6 data elements to sort on, in cascading order, with the First Sort Preference being the primary sort field. Select a data element to sort by from the sort drop down list.

- ◆ Each selected sort criteria can be sorted in either ascending or descending order.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources

Continue

Define Sort Order Preferences

◆ Click drop down boxes to choose elements for sort

First Sort Preference	Last Name	Ascending
Second Sort Preference	First Name	Ascending
Third Sort Preference	SSN	Ascending
Fourth Sort Preference	Grant ID	Ascending
Fifth Sort Preference	Dep Status	Ascending
Sixth Sort Preference	Remain Elig	Ascending
	Roster Section	Ascending
	Pay Stat Code	Ascending
	Adj Rsn Code	Ascending
	Award Amount	Ascending
	Term Amount	Ascending
	Program Code	Ascending

Define Selection Criteria

◆ Check boxes below to limit the records you wish to display.
 ◆ A checked box means that only records with those values will be included. (If no box or every box is checked in a category, you will see all those records for your school.)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input type="checkbox"/> C1	<input type="checkbox"/> C2
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
Housing Code	<input type="checkbox"/> On Campus	<input type="checkbox"/> Off Campus	<input type="checkbox"/> With Parents	
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
			<input type="checkbox"/> 5+	
New/Renewal Students	<input type="checkbox"/> New	<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
Section	<input type="checkbox"/> Eligible	<input type="checkbox"/> CC Reserve	<input type="checkbox"/> Ineligible	
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year		
Renewal Need	From \$ <input type="text"/> To \$ <input type="text"/>			

5) Check boxes in this section to limit the records that will be displayed by this customized roster.

Examples

- ◆ To display only students with Cal Grant A awards check the “A” box next to Program Code.
- ◆ To display new dependent students, check the “New” box and “Dependent” box.
- ◆ To display renewal students with no annual need yet reported, type a “0” in both the from box and to box next to Renewal Need.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

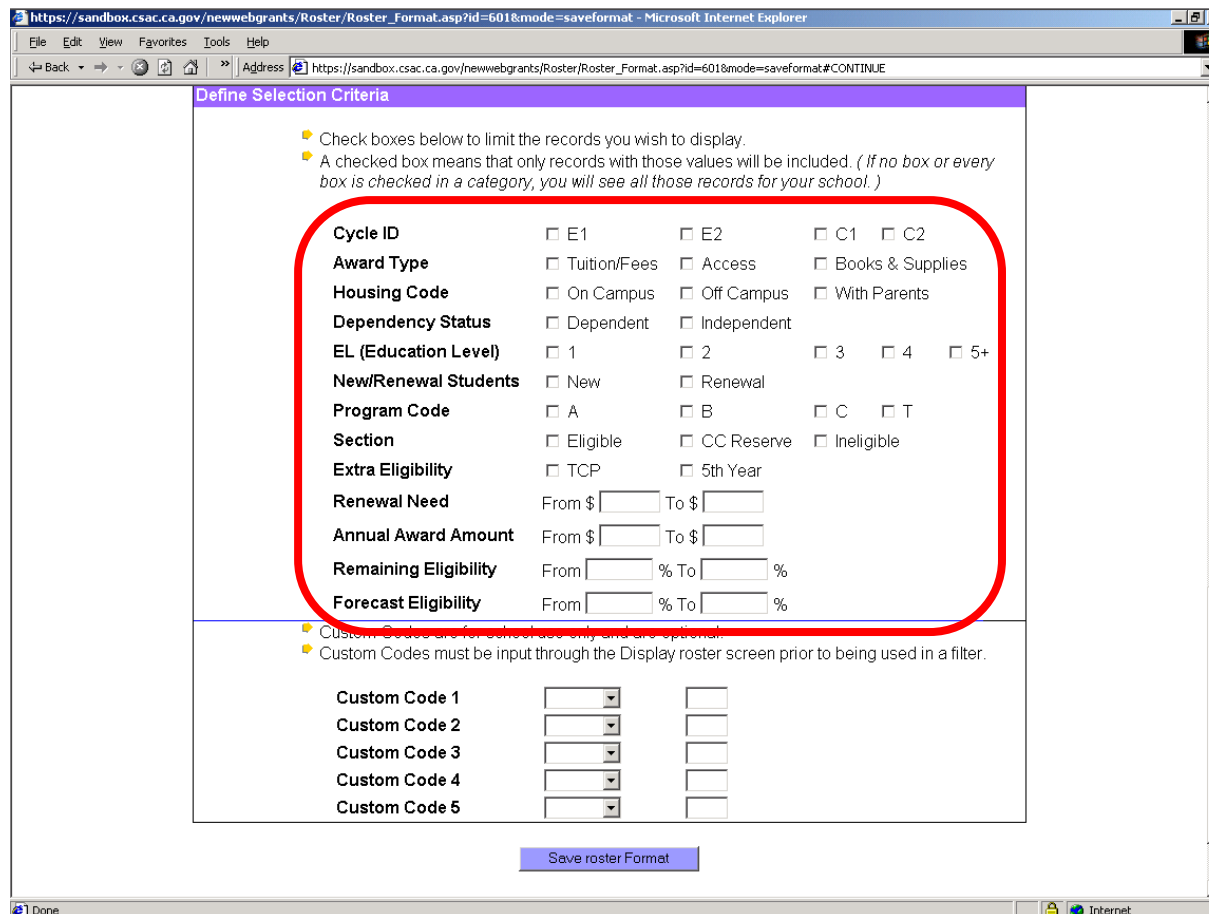
Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources



Define Selection Criteria

Check boxes below to limit the records you wish to display.
A checked box means that only records with those values will be included. (If no box or every box is checked in a category, you will see all those records for your school.)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input type="checkbox"/> C1	<input type="checkbox"/> C2
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
Housing Code	<input type="checkbox"/> On Campus	<input type="checkbox"/> Off Campus	<input type="checkbox"/> With Parents	
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 <input type="checkbox"/> 5+
New/Renewal Students	<input type="checkbox"/> New	<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
Section	<input type="checkbox"/> Eligible	<input type="checkbox"/> CC Reserve	<input type="checkbox"/> Ineligible	
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year		
Renewal Need	From \$ <input type="text"/>	To \$ <input type="text"/>		
Annual Award Amount	From \$ <input type="text"/>	To \$ <input type="text"/>		
Remaining Eligibility	From <input type="text"/> %	To <input type="text"/> %		
Forecast Eligibility	From <input type="text"/> %	To <input type="text"/> %		

Custom Codes are for school use only and are optional.
Custom Codes must be input through the Display roster screen prior to being used in a filter.

Custom Code 1	<input type="text"/>	<input type="text"/>
Custom Code 2	<input type="text"/>	<input type="text"/>
Custom Code 3	<input type="text"/>	<input type="text"/>
Custom Code 4	<input type="text"/>	<input type="text"/>
Custom Code 5	<input type="text"/>	<input type="text"/>

Save roster Format

Custom Roster Page

Creating a Custom Roster

Displaying a Custom Roster

6) Filter student records using the values you may have entered in the custom code fields by either excluding or including certain values.

◆ The filter criteria for the custom codes can include wildcards. For example:

◆ **Excluding** "***" in a custom code field will display all records that have a null value in that field.

◆ **Including** "A*" in a custom code field will display all records that have an A-value in them such as Alice and Audrey.

Agenda

Introduction

A New Look

Accessing the Roster

Searching the Roster

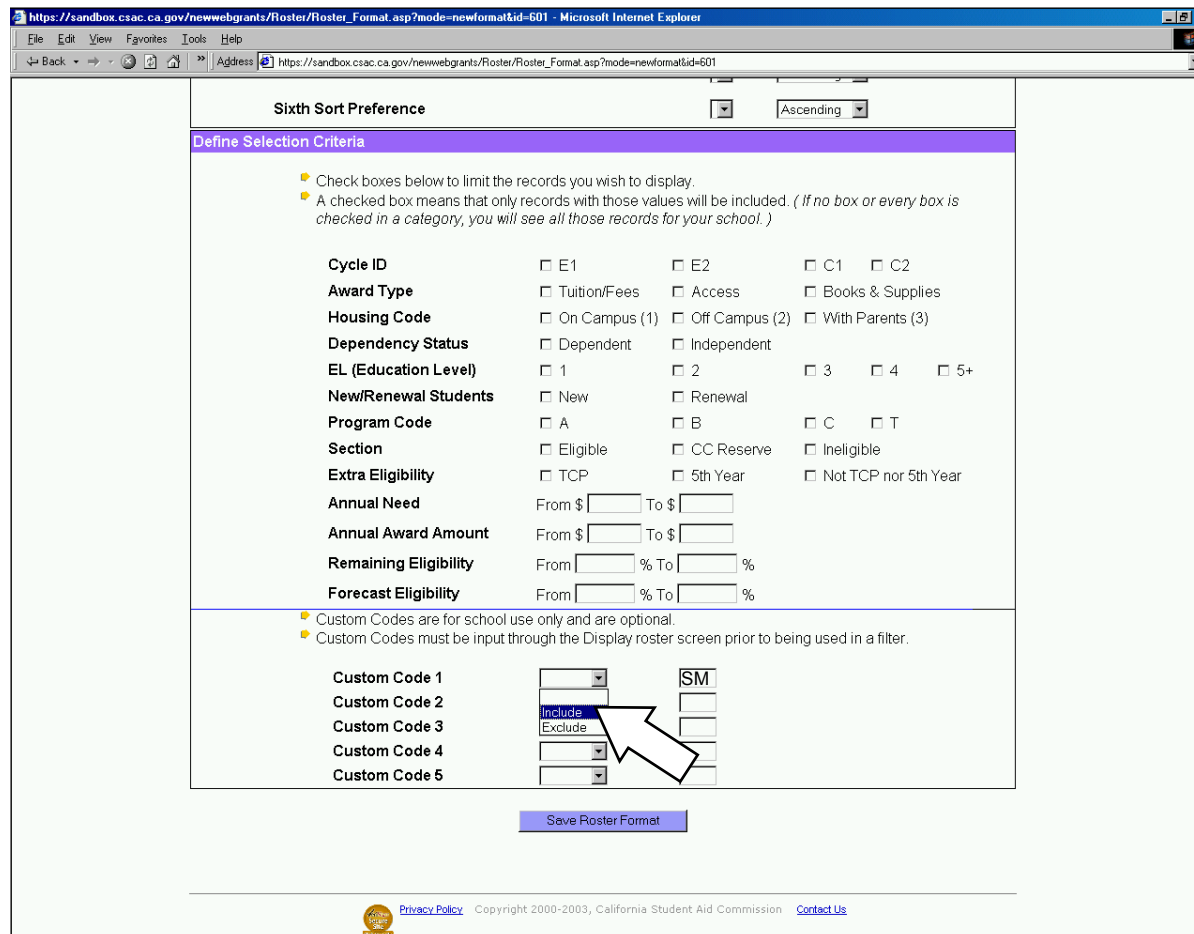
Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources



https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?mode=newformatid=601 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?mode=newformatid=601

Sixth Sort Preference [Dropdown] [Ascending]

Define Selection Criteria

Check boxes below to limit the records you wish to display.
A checked box means that only records with those values will be included. (If no box or every box is checked in a category, you will see all those records for your school.)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input type="checkbox"/> C1	<input type="checkbox"/> C2
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
Housing Code	<input type="checkbox"/> On Campus (1)	<input type="checkbox"/> Off Campus (2)	<input type="checkbox"/> With Parents (3)	
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 <input type="checkbox"/> 5+
New/Renewal Students	<input type="checkbox"/> New	<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
Section	<input type="checkbox"/> Eligible	<input type="checkbox"/> CC Reserve	<input type="checkbox"/> Ineligible	
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year	<input type="checkbox"/> Not TCP nor 5th Year	
Annual Need	From \$ [] To \$ []			
Annual Award Amount	From \$ [] To \$ []			
Remaining Eligibility	From [] % To [] %			
Forecast Eligibility	From [] % To [] %			

Custom Codes are for school use only and are optional.
Custom Codes must be input through the Display roster screen prior to being used in a filter.

Custom Code 1	[Dropdown]	[Dropdown]	SM
Custom Code 2	[Dropdown]	[Dropdown]	
Custom Code 3	[Dropdown]	[Dropdown]	
Custom Code 4	[Dropdown]	[Dropdown]	
Custom Code 5	[Dropdown]	[Dropdown]	

Save Roster Format

Privacy Policy Copyright 2000-2003, California Student Aid Commission Contact Us

- 7) Click the <Save Roster Format> button to save the roster format just created. The "Roster Format successfully save" message will appear.

- ♦ WebGrants users can save up to 5 customized roster formats at one time. If all 5 formats are used, a message will pop-up when attempting to save the 6th roster that advises the user to delete a existing format before saving a new format.

Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

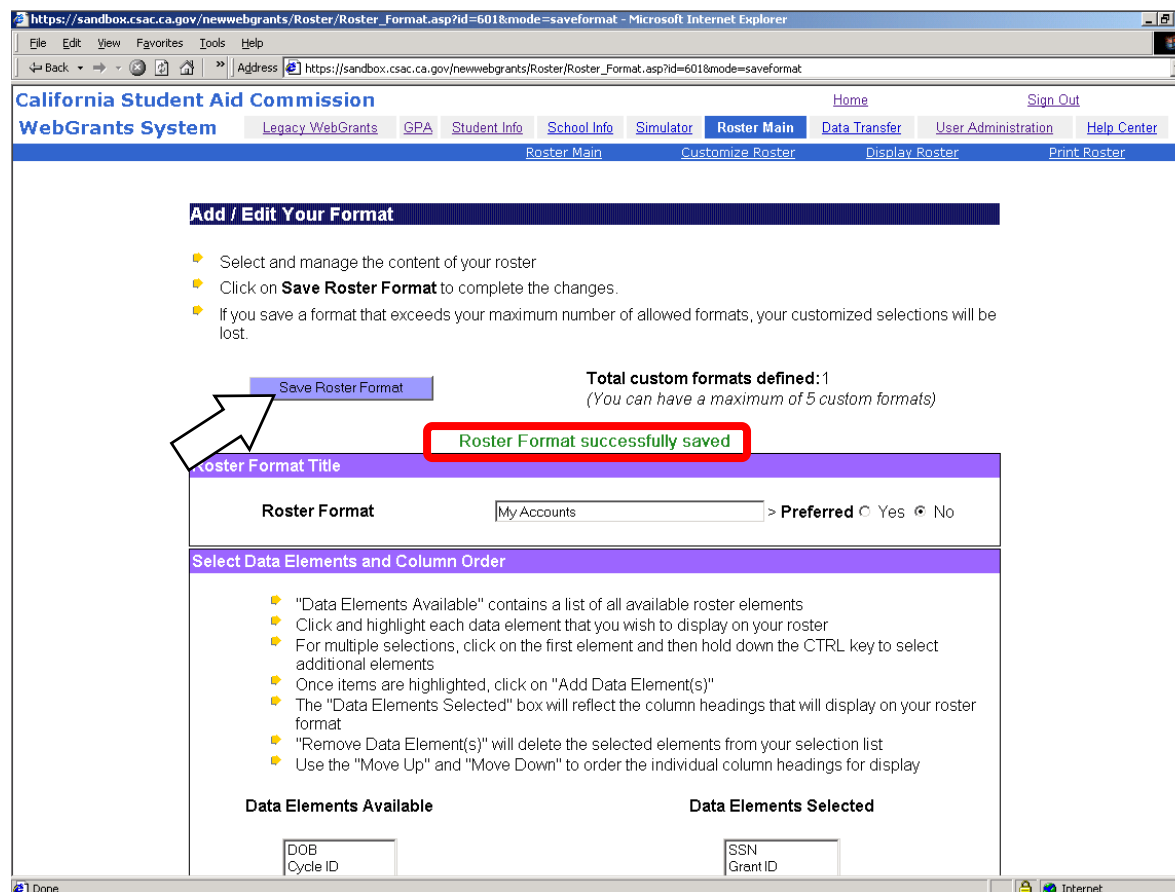
Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

Additional
Resources



https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?id=601&mode=saveformat - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://sandbox.csac.ca.gov/newwebgrants/Roster/Roster_Format.asp?id=601&mode=saveformat

California Student Aid Commission

WebGrants System

Legacy WebGrants GPA Student Info School Info Simulator Roster Main Data Transfer User Administration Help Center

Roster Main Customize Roster Display Roster Print Roster

Add / Edit Your Format

- Select and manage the content of your roster
- Click on **Save Roster Format** to complete the changes.
- If you save a format that exceeds your maximum number of allowed formats, your customized selections will be lost.

Save Roster Format

Total custom formats defined: 1
(You can have a maximum of 5 custom formats)

Roster Format Title

Roster Format My Accounts > Preferred ☐ Yes ☒ No

Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements
- Click and highlight each data element that you wish to display on your roster
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements
- Once items are highlighted, click on "Add Data Element(s)"
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format
- "Remove Data Element(s)" will delete the selected elements from your selection list
- Use the "Move Up" and "Move Down" to order the individual column headings for display

Data Elements Available

DOB
Cycle ID

Data Elements Selected

SSN
Grant ID

Done



Agenda

[Introduction](#)[A New Look](#)[Accessing
the Roster](#)[Searching
the Roster](#)[Reporting
Payment
Transactions](#)[School
Changes](#)[Custom
Codes](#)[Customizing
the Roster](#)[Additional
Resources](#)

How can we use customized roster profiles?

- Sort by student SSN rather than name
- Filter students paid or not paid
- Exclude students not in attendance
(*using custom code*)
- Filter CC Reserve recipients
- Filter students with limited eligibility
- ***Many more...***

♦ Creating, saving and viewing customized rosters is not required. Schools can continue to use the CSAC Standards Roster without using the customization features.

- ◆ Make sure that you do not limit the criteria on your customized roster format too much or when displayed it will not return any records.



A New Look

Accessing the Roster

Searching the Roster

Reporting Payment Transactions

School Changes

Custom Codes

Customizing the Roster

Additional Resources

Online Roster

School ID = 00126000 Acad Year = 2002 - 2003 Format = CSAC Standard Roster SSN =

CSAC Standard Roster

My Accounts

California Student Aid Commission WebGrants System

Home Sign Out Data Transfer User Administration Help Center

Roster Main Customize Roster Display Roster Print Roster

Online Roster for PALOMAR COLLEGE - 00126000 / Acad Year 2002 - 2003

School ID = 00126000 Acad Year = 2002 - 2003 Format = My Accounts SSN =

Total number of records: 3 Total number of pages: 1

Reset Values Print Page SAVE

Update all records with custom code (Will display in Custom Code 5 field) Submit

SSN	Grant ID	Dep Status	Remain Elig
001260013	C01054358	I	125.00%
Custom Codes 1 SM 2 3 4 5			
Fall Term Add Reason Codes Delete Term			
Program Code	Award Type	Annual Award	Term Amount
Totals		\$576	\$288
C	BIS	\$576	\$288
GRY			
001260055	E02011073	D	400.00%
Custom Codes 1 SM 2 3 4 5			
Fall Term Add Reason Codes Delete Term			
Program Code	Award Type	Annual Award	Term Amount
Totals		\$1,551	\$776
B	ACSS	\$1,551	\$776
GRY			
001260081	C00048010	I	%
Custom Codes 1 SM 2 3 4 5			
Fall Term Add Reason Codes Delete Term			
Program Code	Award Type	Annual Award	Term Amount
Totals		\$0	\$0
GRY			

Total number of records: 3 Total number of pages: 1

Additional Resources



Agenda

Introduction

A New Look

Accessing
the Roster

Searching
the Roster

Reporting
Payment
Transactions

School
Changes

Custom
Codes

Customizing
the Roster

**Additional
Resources**

- WebGrants User Guide
 - Requests for the WebGrants user guide can be emailed to otdtraining@csac.ca.gov
 - The Guide will be emailed to you as an Adobe Acrobat file (file extension .pdf)
- New WebGrants Tutorial
 - A self-paced tutorial that walks users through the functions that have been demonstrated here.
 - Requests for the .pdf tutorial can also be emailed to otdtraining@csac.ca.gov
- Additional Questions
 - CSAC Help Desk (888) 294-0148